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Hawai'i Hotel RevPAR Down -37.3% During First Six Months Compared to 2019

RevPAR Up +4.8% For the Month of June Compared to 2019

HONOLULU – Hawai'i hotels statewide reported substantially higher revenue per available room (RevPAR), average daily rate (ADR), and occupancy in June 2021 compared to June 2020 during which the State's quarantine order for travelers due to the COVID-19 pandemic resulted in dramatic declines for the hotel industry. When compared to June 2019, statewide RevPAR and ADR were higher in June 2021 but occupancy was lower.

According to the Hawai'i Hotel Performance Report published by the Hawai'i Tourism Authority (HTA), statewide RevPAR in June 2021 was \$247 (+769.5%), with ADR at \$320 (+127.0%) and occupancy of 77.0 percent (+56.9 percentage points) (Figure 1). Compared to June 2019, RevPAR was 4.8 percent higher than 2019 levels, driven by higher ADR (+14.2%) which offset lower occupancy (-6.9 percentage points) (Figure 5).

"It's a positive sign to see hotel accommodations statewide reporting an upward rise, knowing how many local workers and families are benefiting from the return of the domestic market," said John De Fries, HTA president and CEO. "During the first six months, although the hotel RevPAR and occupancy were still nowhere near the pre-pandemic levels of 2019, it's encouraging to see the steady comeback of jobs and opportunities for kama'āina that weren't there a year ago."

The report's findings utilized data compiled by STR, Inc., which conducts the largest and most comprehensive survey of hotel properties in the Hawaiian Islands. For June, the survey included 138 properties representing 44,614 rooms, or 82.6 percent of all lodging properties¹ and 85.2 percent of operating lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. Vacation rental and timeshare properties were not included in this survey.

During June 2021, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure to Hawai'i through the Safe Travels program. In addition, individuals who were fully vaccinated in Hawai'i could bypass the quarantine order beginning June 15. Inter-county travel restrictions were lifted also on June 15.

Hawai'i hotel room revenues statewide rose to \$387.7 million (+1,607.1% vs. 2020, +1.5% vs. 2019) in June. Room demand was 1.2 million room nights (+652.0% vs. 2020, -11.1% vs. 2019) and room supply was 1.6 million room nights (+96.3% vs. 2020, -3.2% vs. 2019) (Figure 2). Many properties closed or reduced operations starting in April 2020. Due to these supply reductions, comparative data for certain markets and prices classes were not available for 2020; comparisons to 2019 have been added.

¹ Based on 2019 census rooms.

Luxury Class properties earned RevPAR of \$530 (+19.5% vs. 2019²), with ADR at \$754 (+36.2% vs. 2019²) and occupancy of 70.2 percent (-9.8 percentage points vs. 2019²). Midscale & Economy Class properties earned RevPAR of \$122 (+166.7% vs. 2020, -11.7% vs. 2019) with ADR at \$163 (+52.9% vs. 2020, -3.8% vs. 2019) and occupancy of 75.2 percent (+32.1 percentage points vs. 2020, -6.7 percentage points vs. 2019).

Maui County hotels led the counties in June and achieved RevPAR that surpassed June 2019. RevPAR was \$394 (+1,523.8% vs. 2020, +24.1% vs. 2019), with ADR at \$498 (+260.4% vs. 2020, +26.3% vs. 2019) and occupancy of 79.2 percent (+61.6 percentage points vs. 2020, -1.4 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$595 (+5.9% vs. 2019²), with ADR at \$790 (+28.0% vs. 2019²) and occupancy of 75.3 percent (-15.7 percentage points vs. 2019²). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$357 (+5,498.9% vs. 2020, +32.3% vs. 2019), ADR at \$437 (+408.2% vs. 2020, +31.6% vs. 2019) and occupancy of 81.7 percent (+74.3 percentage points vs. 2020, +0.4 percentage points vs. 2019).

Hotels on the island of Hawai'i reported strong RevPAR growth at \$281 (+655.9% vs. 2020, +43.9% vs. 2019), with ADR at \$356 (+208.4% vs. 2020, +42.8% vs. 2019), and occupancy of 79.0 percent (+46.8 percentage points vs. 2020, +0.6 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$452 (+62.1% vs. 2019²), with ADR at \$557 (+58.4% vs. 2019²), and occupancy of 81.2 percent (+1.9 percentage points vs. 2019²).

Kaua'i hotels earned RevPAR of \$266 (+759.1% vs. 2020, +27.7% vs. 2019), with ADR at \$339 (+135.0% vs. 2020, +21.0% vs. 2019) and occupancy of 78.4 percent (+57.0 percentage points vs. 2020, +4.1 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$171 (+516.5% vs. 2020, -19.8% vs. 2019) in June, ADR at \$227 (+49.9% vs. 2020, -6.5% vs. 2019) and occupancy of 75.4 percent (+57.1 percentage points vs. 2020, -12.5 percentage points vs. 2019). Waikīkī hotels earned \$166 (+661.9% vs. 2020, -20.6% vs. 2019) in RevPAR with ADR at \$218 (+46.6% vs. 2020, -8.1% vs. 2019) and occupancy of 76.2 percent (+61.5 percentage points vs. 2020, -12.0 percentage points vs. 2019).

First Half 2021

Through the first half of 2021, Hawai'i hotel performance statewide continued to be impacted by the COVID-19 pandemic. Hawai'i hotels earned \$141 in RevPAR (-4.7% vs. 2020, -37.3% vs. 2019), with ADR at \$293 (+1.6% vs. 2020, +4.8% vs. 2019) and occupancy at 48.1 percent (-3.2 percentage points vs. 2020, -32.3 percentage points vs. 2019).

Total statewide hotel revenues for the first half of 2021 were \$1.3 billion (+18.5% vs. 2020, -41.0% vs. 2019). Room supply was 9.2 million room nights (+24.3% vs. 2020, -5.9% vs. 2019), and room demand was 4.4 million room nights (+16.6% vs. 2020, -43.7% vs. 2019).

Comparison to Top U.S. Markets

In comparison to the top U.S. markets during the first half of 2021, the Hawaiian Islands earned the second highest RevPAR. Miami, Florida led the nation in RevPAR at \$155 (+24.2%); Tampa, Florida ranked third at \$100 (+42.1%) (Figure 19).

The Hawaiian Islands led the U.S. markets in ADR for the first half of 2021 at \$293, followed by Miami, Florida at \$227 (-1.5%) and New York, New York at \$154 (-5.2%) (Figure 20).

² Comparative data for 2020 were not available.

With the U.S. Mainland accessible for road trips and short-haul inter-continental flights, the Hawaiian Islands' occupancy for the first six months of 2021 was lower than many destinations in STR's top 25 markets; landing at the 17th spot (Figure 21). Tampa, Florida topped the country in occupancy at 70.4 percent (+17.0 percentage points), followed by Miami, Florida at 68.5 percent (+14.2 percentage points), and Phoenix, Arizona at 61.7 percent (+8.1 percentage points).

Comparison to International Markets

When compared to international "sun and sea" destinations for the first half of 2021, Maui County ranked second in RevPAR at \$247. Hotels in the Maldives ranked highest in RevPAR at \$391 (+31.2%). The island of Hawai'i, Kaua'i, and O'ahu ranked fifth, eighth, and tenth, respectively (Figure 22).

Through the first half of 2021, the Maldives led in ADR at \$794 (+8.1%), followed by French Polynesia (\$634²) and Maui County (\$475, +10.2%). The island of Hawai'i, Kaua'i, and O'ahu ranked fifth, seventh, and tenth, respectively (Figure 23).

Puerto Rico led in occupancy for "sun and sea" destinations during the first half of 2021 at 60.9 percent (+23.4 percentage points), followed by Maui (52.0 percent) and the Cancun region (51.6 percent, +14.5 percentage points). The island of Hawai'i, O'ahu, and Kaua'i ranked fourth, seventh, and eighth, respectively (Figure 24).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaii tourism authority.org/research/infrastructure-research/>

About the Hawai'i Hotel Performance Report

The Hawai'i Hotel Performance Report is produced using hotel survey data compiled by STR, Inc., the largest survey of its kind in Hawai'i. The survey generally excludes properties with under 20 lodging units, such as small bed and breakfasts, youth hostels, single-family vacation rentals, cottages, individually rented vacation condominiums and sold timeshare units no longer available for hotel use. The data has been weighted both geographically and by class of property to compensate for any over and/or under representation of hotel survey participants by location and type.

For June, the survey included 138 properties¹ representing 44,614 rooms, or 82.6 percent of all lodging properties and 85.2 percent of operating lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The June survey included 71 properties on O'ahu representing 27,470 rooms (94.6% of operating properties); 38 properties in the County of Maui, representing 9,490 rooms (72.9% of operating properties); 15 properties on the island of Hawai'i, representing 4,760 rooms (72.9% of operating properties); and 14 properties on Kaua'i, representing 2,894 rooms (72.4% of operating properties).

About the Hawai'i Tourism Authority

The [Hawai'i Tourism Authority](http://www.hawaii tourism authority.org) is the State of Hawai'i agency responsible for strategically managing its support of the tourism industry. Established in 1998 to support Hawai'i's leading industry and largest employer, HTA continually strives to help ensure tourism's sustainability and the benefits it brings to residents and communities statewide.

For more information about HTA, please visit www.hawaii tourism authority.org. Follow updates from HTA (@HawaiiHTA) on [Facebook](#), [Instagram](#), [Twitter](#) and its new [YouTube Channel](#).

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Figure 1: Hawai'i Hotel Performance June 2021

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2020	Percentage Pt. Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	77.0%	20.1%	56.9%	\$320.30	\$141.11	127.0%	\$246.75	\$28.38	769.5%
Luxury Class	70.2%	NA	NA	\$754.29	NA	NA	\$529.54	NA	NA
Upper Upscale Class	78.3%	16.9%	61.4%	\$305.82	\$163.84	86.7%	\$239.57	\$27.74	763.6%
Upscale Class	80.4%	13.6%	66.8%	\$237.89	\$149.88	58.7%	\$191.23	\$20.39	837.9%
Upper Midscale Class	75.5%	25.1%	50.4%	\$169.13	\$137.08	23.4%	\$127.69	\$34.45	270.7%
Midscale & Economy Class	75.2%	43.1%	32.1%	\$162.52	\$106.30	52.9%	\$122.14	\$45.79	166.7%
O'ahu	75.4%	18.3%	57.1%	\$227.22	\$151.62	49.9%	\$171.40	\$27.80	516.5%
Waikiki	76.2%	14.7%	61.5%	\$218.07	\$148.79	46.6%	\$166.18	\$21.81	661.9%
Other O'ahu	70.7%	34.1%	36.7%	\$287.70	\$156.81	83.5%	\$203.48	\$53.41	281.0%
O'ahu Luxury	64.0%	NA	NA	\$581.61	NA	NA	\$372.01	NA	NA
O'ahu Upper Upscale	76.1%	13.0%	63.1%	\$240.60	\$177.88	35.3%	\$183.09	\$23.16	690.5%
O'ahu Upscale	80.1%	16.8%	63.4%	\$198.03	\$167.26	18.4%	\$158.70	\$28.05	465.8%
O'ahu Upper Midscale	74.2%	23.1%	51.1%	\$156.78	\$139.54	12.4%	\$116.26	\$32.22	260.8%
O'ahu Midscale & Economy	71.0%	37.1%	34.0%	\$130.16	\$114.23	13.9%	\$92.43	\$42.33	118.4%
Maui County	79.2%	17.6%	61.6%	\$497.66	\$138.10	260.4%	\$394.26	\$24.28	1523.8%
Wailea	75.3%	NA	NA	\$789.57	NA	NA	\$594.85	NA	NA
Lahaina/Kā'anapali/Kapalua	81.7%	7.4%	74.3%	\$437.37	\$86.07	408.2%	\$357.21	\$6.38	5498.9%
Other Maui County	76.4%	29.6%	46.8%	\$572.65	\$153.52	273.0%	\$437.35	\$45.46	862.1%
Maui County Luxury	69.4%	NA	NA	\$887.87	NA	NA	\$616.07	NA	NA
Maui County Upper Upscale & Upscale	83.5%	9.8%	73.6%	\$410.77	\$143.80	185.6%	\$342.94	\$14.15	2323.6%
Island of Hawai'i	79.0%	32.2%	46.8%	\$355.61	\$115.31	208.4%	\$281.05	\$37.18	655.9%
Kohala Coast	81.2%	NA	NA	\$556.50	NA	NA	\$451.69	NA	NA
Kaua'i	78.4%	21.4%	57.0%	\$339.49	\$144.48	135.0%	\$266.16	\$30.98	759.1%

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Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 2: Hawai'i Hotel Performance by Measure June 2021

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	1,571.1	800.2	96.3%	1,210.3	160.9	652.0%	387.7	22.7	1607.1%
O'ahu	871.5	423.5	105.8%	657.5	77.7	746.6%	149.4	11.8	1168.7%
Waikiki	749.4	343.3	118.3%	571.1	50.3	1035.0%	124.5	7.5	1563.5%
Maui County	383.8	195.6	96.2%	304.1	34.4	784.2%	151.3	4.7	3086.3%
Wailea	86.9	NA	NA	65.5	NA	NA	51.7	NA	NA
Lahaina/Kā'anapali/Kapalua	206.4	106.1	94.6%	168.5	7.9	2044.4%	73.7	0.7	10797.0%
Island of Hawai'i	195.9	93.3	109.9%	154.8	30.1	414.6%	55.0	3.5	1486.9%
Kohala Coast	83.9	NA	NA	68.1	NA	NA	37.9	NA	NA
Kaua'i	119.9	87.7	36.7%	94.0	18.8	399.7%	31.9	2.7	1074.3%

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Figure 3: Hawai'i Hotel Performance Year-to-Date June 2021

	Occupancy % Percentage Pt. Change			Average Daily Rate %Change			RevPAR %Change		
	2021	2020		2021	2020		2021	2020	
State of Hawai'i	48.1%	51.3%	-3.2%	\$293.32	\$288.60	1.6%	\$141.14	\$148.09	-4.7%
Luxury Class	42.9%	NA	NA	\$730.28	NA	NA	\$313.27	NA	NA
Upper Upscale Class	44.9%	53.4%	-8.5%	\$278.56	\$287.84	-3.2%	\$125.18	\$153.83	-18.6%
Upscale Class	52.6%	43.5%	9.2%	\$208.99	\$224.21	-6.8%	\$109.95	\$97.43	12.9%
Upper Midscale Class	52.9%	52.1%	0.7%	\$151.83	\$170.81	-11.1%	\$80.24	\$89.04	-9.9%
Midscale & Economy Class	53.1%	56.9%	-3.8%	\$203.66	\$175.63	16.0%	\$108.24	\$99.99	8.3%
O'ahu	46.3%	51.8%	-5.5%	\$197.41	\$234.54	-15.8%	\$91.33	\$121.42	-24.8%
Waikiki	45.4%	50.9%	-5.4%	\$188.44	\$232.57	-19.0%	\$85.64	\$118.28	-27.6%
Other O'ahu	51.7%	56.7%	-5.0%	\$249.78	\$244.02	2.4%	\$129.12	\$138.27	-6.6%
O'ahu Luxury	35.4%	NA	NA	\$546.16	NA	NA	\$193.57	NA	NA
O'ahu Upper Upscale	40.3%	51.8%	-11.5%	\$219.18	\$256.87	-14.7%	\$88.39	\$133.16	-33.6%
O'ahu Upscale	55.4%	49.1%	6.4%	\$173.71	\$199.61	-13.0%	\$96.30	\$97.95	-1.7%
O'ahu Upper Midscale	51.4%	51.3%	0.2%	\$138.09	\$162.11	-14.8%	\$71.02	\$83.13	-14.6%
O'ahu Midscale & Economy	56.2%	61.0%	-4.9%	\$106.14	\$130.60	-18.7%	\$59.62	\$79.72	-25.2%
Maui County	52.0%	50.6%	1.3%	\$475.25	\$431.29	10.2%	\$247.09	\$218.44	13.1%
Wailea	47.8%	NA	NA	\$769.96	NA	NA	\$368.06	NA	NA
Lahaina/Kā'anapali/Kapalua	51.4%	47.0%	4.4%	\$400.07	\$377.95	5.9%	\$205.79	\$177.67	15.8%
Other Maui County	52.6%	55.1%	-2.5%	\$562.02	\$486.90	15.4%	\$295.86	\$268.29	10.3%
Maui County Luxury	45.0%	NA	NA	\$847.63	NA	NA	\$381.19	NA	NA
Maui County Upper Upscale & Upscale	54.1%	47.0%	7.1%	\$361.71	\$360.31	0.4%	\$195.77	\$169.46	15.5%
Island of Hawai'i	51.3%	54.0%	-2.7%	\$319.19	\$273.53	16.7%	\$163.68	\$147.65	10.9%
Kohala Coast	54.4%	NA	NA	\$484.47	NA	NA	\$263.55	NA	NA
Kaua'i	43.3%	46.4%	-3.1%	\$268.55	\$292.16	-8.1%	\$116.19	\$135.43	-14.2%

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Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 4: Hawai'i Hotel Performance by Measure Year-to-Date June 2021

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	9,218.4	7,415.8	24.3%	4,435.6	3,805.4	16.6%	1,301.0	1,098.2	18.5%
O'ahu	5,098.5	4,160.4	22.5%	2,358.7	2,153.9	9.5%	465.6	505.2	-7.8%
Waikiki	4,431.6	3,506.3	26.4%	2,013.9	1,783.3	12.9%	379.5	414.7	-8.5%
Maui County	2,301.3	1,698.9	35.5%	1,196.4	860.5	39.0%	568.6	371.1	53.2%
Wailea	509.1	NA	NA	243.3	NA	NA	187.4	NA	NA
Lahaina/Kā'anapali/ Kapalua	1,246.1	934.4	33.4%	641.0	439.2	45.9%	256.4	166.0	54.5%
Island of Hawai'i	1,168.7	911.8	28.2%	599.3	492.2	21.8%	191.3	134.6	42.1%
Kohala Coast	505.7	NA	NA	275.1	NA	NA	133.3	NA	NA
Kaua'i	650.0	644.7	0.8%	281.2	298.9	-5.9%	75.5	87.3	-13.5%

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Figure 5: Hawai'i Hotel Performance June 2021 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2019	Percentage Pt. Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	77.0%	83.9%	-6.9%	\$320.30	\$280.51	14.2%	\$246.75	\$235.44	4.8%
Luxury Class	70.2%	80.0%	-9.8%	\$754.29	\$553.86	36.2%	\$529.54	\$443.10	19.5%
Upper Upscale Class	78.3%	86.6%	-8.3%	\$305.82	\$281.87	8.5%	\$239.57	\$244.19	-1.9%
Upscale Class	80.4%	81.2%	-0.8%	\$237.89	\$206.74	15.1%	\$191.23	\$167.94	13.9%
Upper Midscale Class	75.5%	86.5%	-11.0%	\$169.13	\$166.74	1.4%	\$127.69	\$144.23	-11.5%
Midscale & Economy Class	75.2%	81.9%	-6.7%	\$162.52	\$168.95	-3.8%	\$122.14	\$138.34	-11.7%
O'ahu	75.4%	87.9%	-12.5%	\$227.22	\$242.90	-6.5%	\$171.40	\$213.63	-19.8%
Waikiki	76.2%	88.2%	-12.0%	\$218.07	\$237.35	-8.1%	\$166.18	\$209.37	-20.6%
Other O'ahu	70.7%	86.4%	-15.6%	\$287.70	\$277.10	3.8%	\$203.48	\$239.33	-15.0%
O'ahu Luxury	64.0%	87.9%	-23.9%	\$581.61	\$478.26	21.6%	\$372.01	\$420.43	-11.5%
O'ahu Upper Upscale	76.1%	89.3%	-13.2%	\$240.60	\$268.33	-10.3%	\$183.09	\$239.72	-23.6%
O'ahu Upscale	80.1%	89.3%	-9.2%	\$198.03	\$198.72	-0.3%	\$158.70	\$177.48	-10.6%
O'ahu Upper Midscale	74.2%	87.2%	-13.1%	\$156.78	\$162.77	-3.7%	\$116.26	\$141.95	-18.1%
O'ahu Midscale & Economy	71.0%	88.8%	-17.8%	\$130.16	\$142.58	-8.7%	\$92.43	\$126.64	-27.0%
Maui County	79.2%	80.6%	-1.4%	\$497.66	\$393.97	26.3%	\$394.26	\$317.57	24.1%
Wailea	75.3%	91.1%	-15.7%	\$789.57	\$616.71	28.0%	\$594.85	\$561.61	5.9%
Lahaina/Kā'anapali/Kapalua	81.7%	81.2%	0.4%	\$437.37	\$332.40	31.6%	\$357.21	\$270.05	32.3%
Other Maui County	76.4%	79.8%	-3.4%	\$572.65	\$473.97	20.8%	\$437.35	\$378.22	15.6%
Maui County Luxury	69.4%	85.1%	-15.7%	\$887.87	\$549.93	61.5%	\$616.07	\$468.15	31.6%
Maui County Upper Upscale & Upscale	83.5%	81.0%	2.5%	\$410.77	\$311.71	31.8%	\$342.94	\$252.50	35.8%
Island of Hawai'i	79.0%	78.4%	0.6%	\$355.61	\$249.05	42.8%	\$281.05	\$195.25	43.9%
Kohala Coast	81.2%	79.3%	1.9%	\$556.50	\$351.42	58.4%	\$451.69	\$278.68	62.1%
Kaua'i	78.4%	74.3%	4.1%	\$339.49	\$280.48	21.0%	\$266.16	\$208.42	27.7%

Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority

Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 6: Hawai'i Hotel Performance by Measure June 2021 vs. 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2019	% Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	1,571.1	1,622.8	-3.2%	1,210.3	1,362.1	-11.1%	387.7	382.1	1.5%
O'ahu	871.5	910.4	-4.3%	657.5	800.7	-17.9%	149.4	194.5	-23.2%
Waikiki	749.4	781.0	-4.0%	571.1	688.9	-17.1%	124.5	163.5	-23.8%
Maui County	383.8	381.8	0.5%	304.1	307.7	-1.2%	151.3	121.2	24.8%
Wailea	86.9	65.8	32.1%	65.5	59.9	9.3%	51.7	37.0	39.9%
Lahaina/Kā'anapali/Kapalua	206.4	214.1	-3.6%	168.5	173.9	-3.1%	73.7	57.8	27.5%
Island of Hawai'i	195.9	194.2	0.9%	154.8	152.2	1.7%	55.0	37.9	45.2%
Kohala Coast	83.9	90.0	-6.8%	68.1	71.4	-4.6%	37.9	25.1	51.1%
Kaua'i	119.9	136.4	-12.2%	94.0	101.4	-7.3%	31.9	28.4	12.2%

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Figure 7: Hawai'i Hotel Performance Year-to-Date June 2021 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2019	Percentage Pt. Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	48.1%	80.5%	-32.3%	\$293.32	\$279.99	4.8%	\$141.14	\$225.27	-37.3%
Luxury Class	42.9%	76.3%	-33.4%	\$730.28	\$562.14	29.9%	\$313.27	\$428.71	-26.9%
Upper Upscale Class	44.9%	82.2%	-37.3%	\$278.56	\$277.99	0.2%	\$125.18	\$228.63	-45.2%
Upscale Class	52.6%	77.8%	-25.2%	\$208.99	\$210.14	-0.5%	\$109.95	\$163.51	-32.8%
Upper Midscale Class	52.9%	83.5%	-30.7%	\$151.83	\$161.33	-5.9%	\$80.24	\$134.74	-40.4%
Midscale & Economy Class	53.1%	82.4%	-29.2%	\$203.66	\$175.43	16.1%	\$108.24	\$144.53	-25.1%
O'ahu	46.3%	83.3%	-37.0%	\$197.41	\$233.18	-15.3%	\$91.33	\$194.19	-53.0%
Waikiki	45.4%	83.5%	-38.1%	\$188.44	\$228.28	-17.5%	\$85.64	\$190.68	-55.1%
Other O'ahu	51.7%	81.8%	-30.1%	\$249.78	\$263.44	-5.2%	\$129.12	\$215.42	-40.1%
O'ahu Luxury	35.4%	71.1%	-35.7%	\$546.16	\$483.31	13.0%	\$193.57	\$343.77	-43.7%
O'ahu Upper Upscale	40.3%	84.8%	-44.4%	\$219.18	\$257.23	-14.8%	\$88.39	\$218.03	-59.5%
O'ahu Upscale	55.4%	83.6%	-28.2%	\$173.71	\$191.67	-9.4%	\$96.30	\$160.28	-39.9%
O'ahu Upper Midscale	51.4%	83.9%	-32.5%	\$138.09	\$154.43	-10.6%	\$71.02	\$129.55	-45.2%
O'ahu Midscale & Economy	56.2%	87.1%	-31.0%	\$106.14	\$130.47	-18.6%	\$59.62	\$113.67	-47.5%
Maui County	52.0%	78.5%	-26.5%	\$475.25	\$403.40	17.8%	\$247.09	\$316.65	-22.0%
Wailea	47.8%	89.7%	-41.9%	\$769.96	\$613.26	25.6%	\$368.06	\$549.84	-33.1%
Lahaina/Kā'anapali/Kapalua	51.4%	77.8%	-26.4%	\$400.07	\$338.38	18.2%	\$205.79	\$263.32	-21.8%
Other Maui County	52.6%	79.4%	-26.7%	\$562.02	\$484.75	15.9%	\$295.86	\$384.71	-23.1%
Maui County Luxury	45.0%	82.0%	-37.0%	\$847.63	\$661.02	28.2%	\$381.19	\$541.94	-29.7%
Maui County Upper Upscale & Upscale	54.1%	78.4%	-24.2%	\$361.71	\$320.82	12.7%	\$195.77	\$251.42	-22.1%
Island of Hawai'i	51.3%	76.9%	-25.6%	\$319.19	\$266.34	19.8%	\$163.68	\$204.89	-20.1%
Kohala Coast	54.4%	77.5%	-23.1%	\$484.47	\$376.91	28.5%	\$263.55	\$291.98	-9.7%
Kaua'i	43.3%	72.1%	-28.8%	\$268.55	\$285.94	-6.1%	\$116.19	\$206.16	-43.6%

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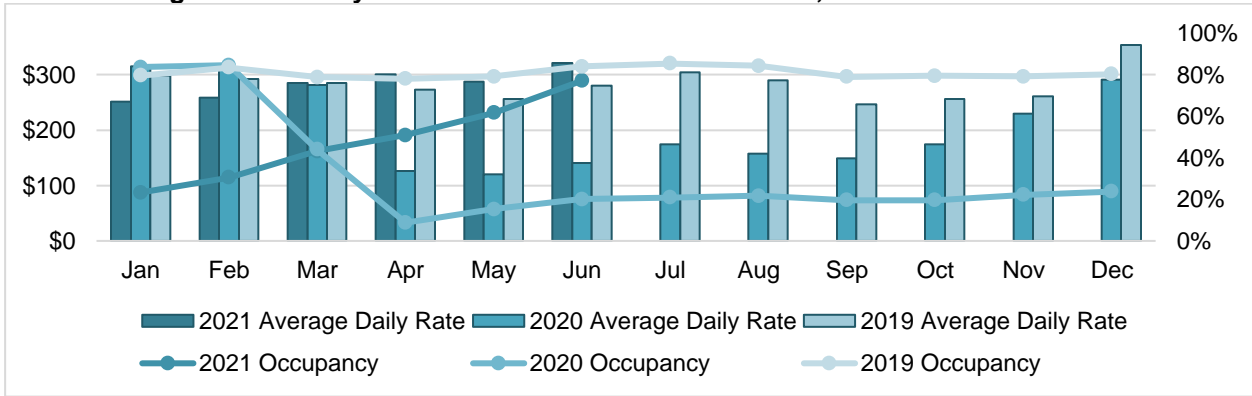
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 8: Hawai'i Hotel Performance by Measure Year-to-Date June 2021 vs. 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2019	% Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	9,218.4	9,795.0	-5.9%	4,435.6	7,880.9	-43.7%	1,301.0	2,206.5	-41.0%
O'ahu	5,098.5	5,499.4	-7.3%	2,358.7	4,579.8	-48.5%	465.6	1,067.9	-56.4%
Waikiki	4,431.6	4,718.7	-6.1%	2,013.9	3,941.5	-48.9%	379.5	899.8	-57.8%
Maui County	2,301.3	2,303.4	-0.1%	1,196.4	1,808.1	-33.8%	568.6	729.4	-22.0%
Wailea	509.1	397.1	28.2%	243.3	356.1	-31.7%	187.4	218.4	-14.2%
Lahaina/Kā'anapali/Kapalua	1,246.1	1,291.4	-3.5%	641.0	1,005.0	-36.2%	256.4	340.1	-24.6%
Island of Hawai'i	1,168.7	1,171.6	-0.2%	599.3	901.3	-33.5%	191.3	240.0	-20.3%
Kohala Coast	505.7	543.0	-6.9%	275.1	420.6	-34.6%	133.3	158.5	-15.9%
Kaua'i	650.0	820.6	-20.8%	281.2	591.7	-52.5%	75.5	169.2	-55.4%

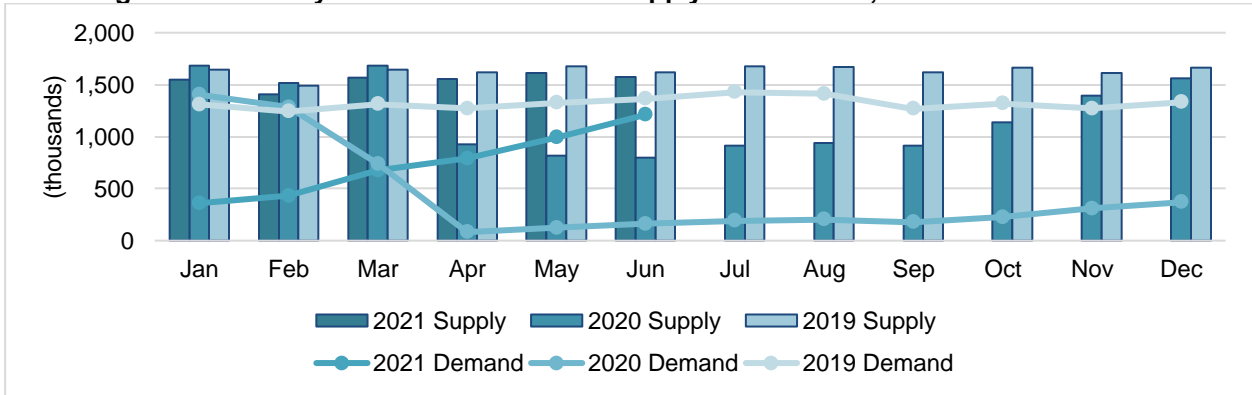
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Figure 9: Monthly State of Hawai'i Hotel Performance, 2021 vs. 2020 vs. 2019



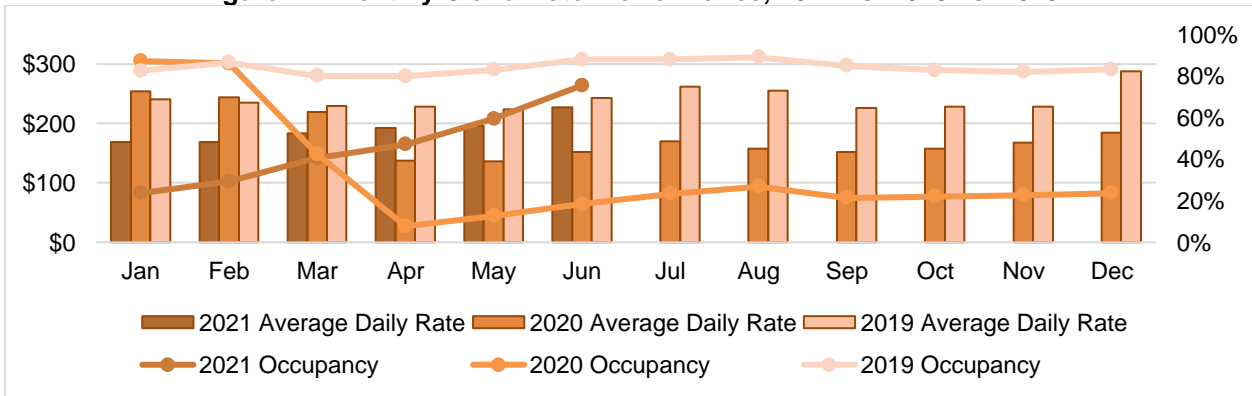
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Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



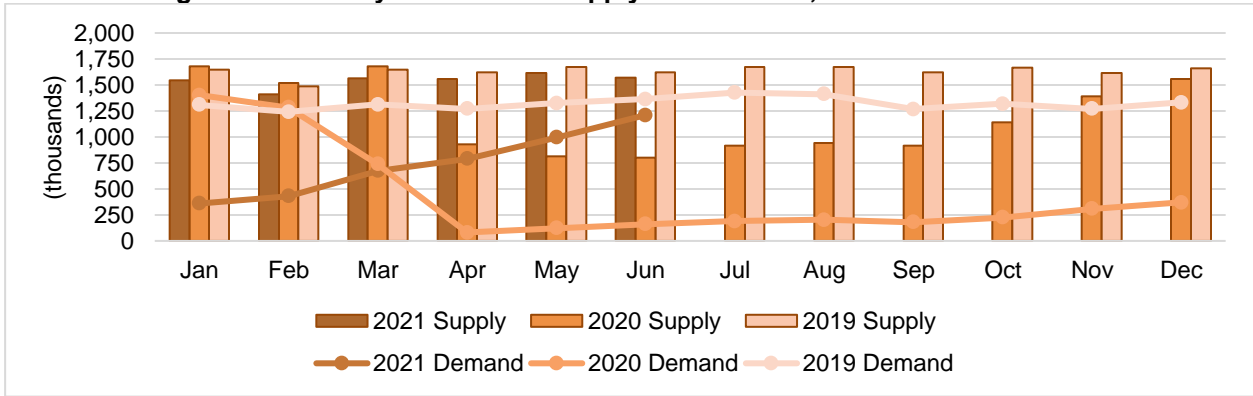
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

Figure 11: Monthly O'ahu Hotel Performance, 2021 vs. 2020 vs. 2019



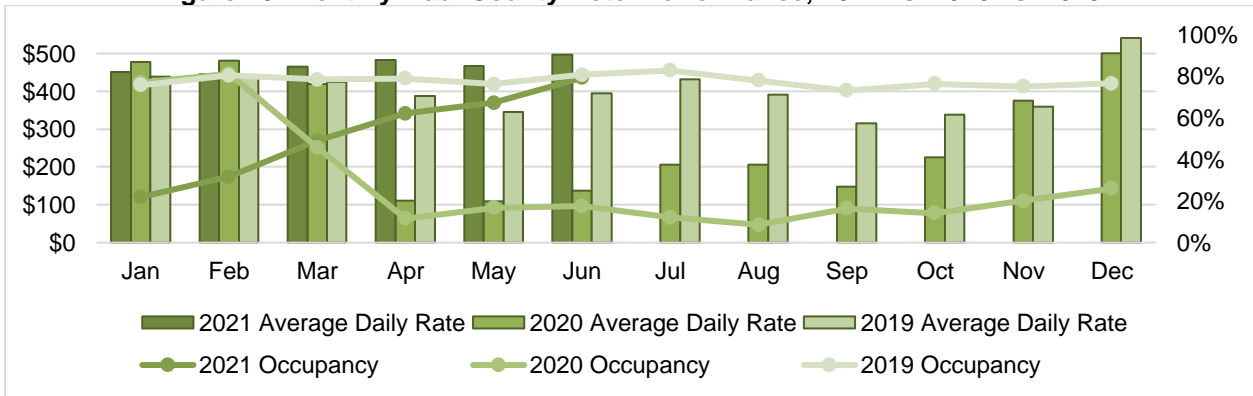
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Figure 12: Monthly O'ahu Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



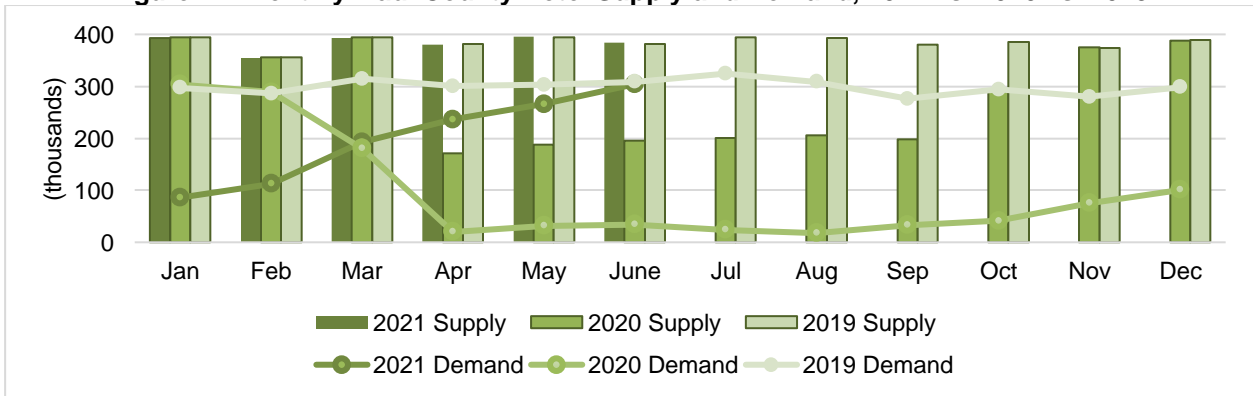
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Figure 13: Monthly Maui County Hotel Performance, 2021 vs. 2020 vs. 2019



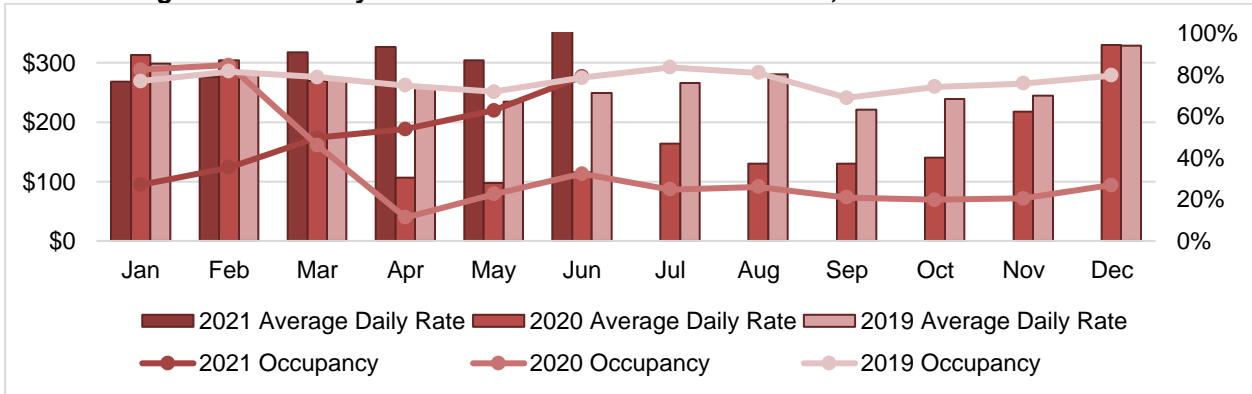
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Figure 14: Monthly Maui County Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



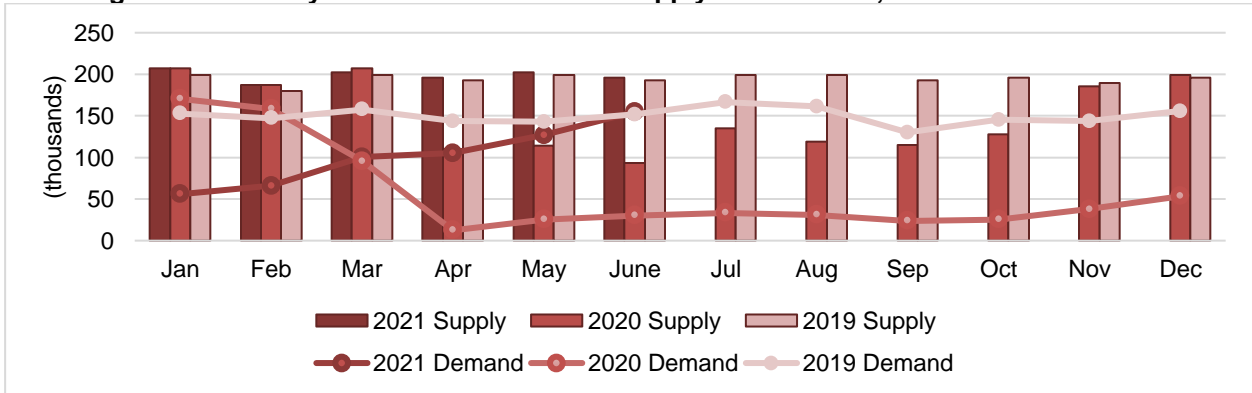
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Figure 15: Monthly Island of Hawai'i Hotel Performance, 2021 vs. 2020 vs. 2019



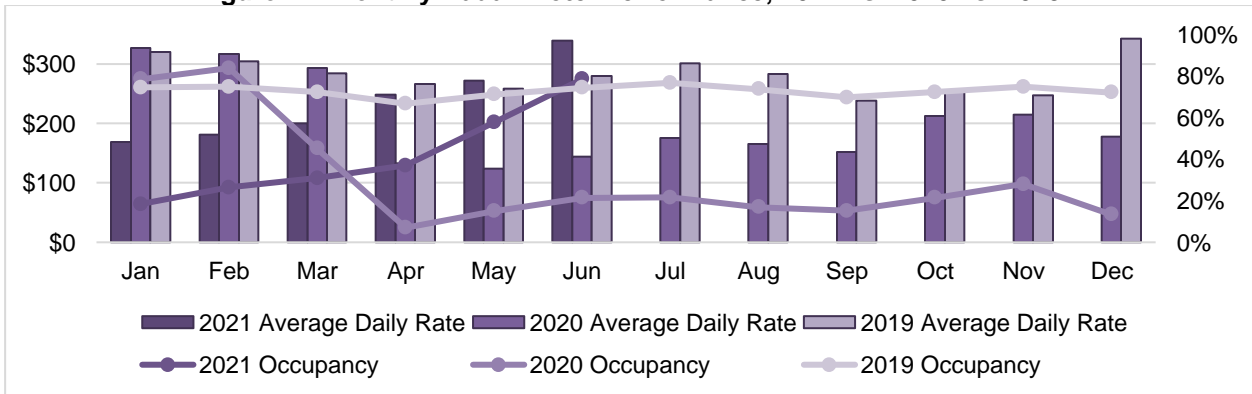
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Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



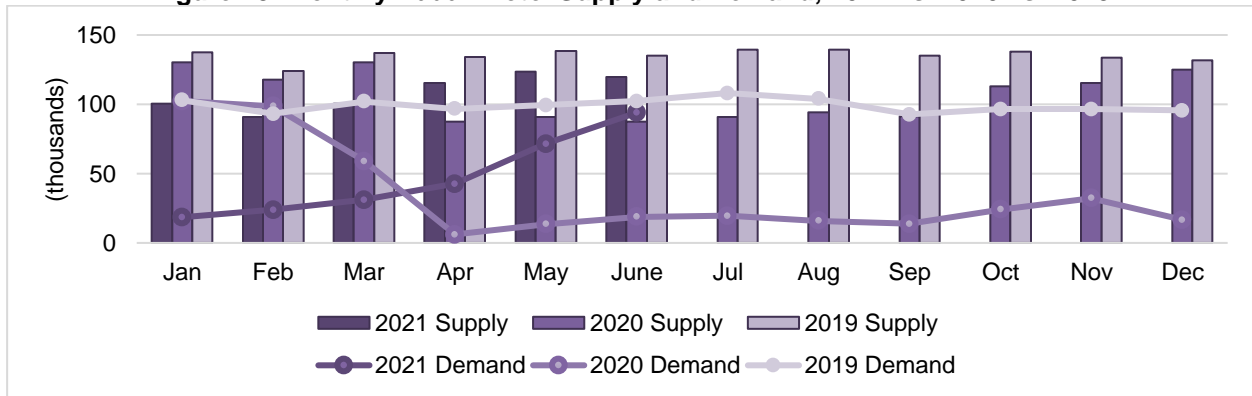
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Figure 17: Monthly Kaua'i Hotel Performance, 2021 vs. 2020 vs. 2019



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Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



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Figure 19: Top 5 U.S. Markets – Revenue Per Available Room – YTD June 2021

Rank	Destination	Revenue Per Available Room	% Change
1	Miami, FL	\$155.21	24.2%
2	Hawaiian Islands	\$141.14	-4.7%
3	Tampa, FL	\$100.40	42.1%
4	Los Angeles, CA	\$80.35	5.9%
5	New York, NY	\$77.68	-11.9%

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Figure 20: Top 5 U.S. Markets – Average Daily Rate – YTD June 2021

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$293.32	1.6%
2	Miami, FL	\$226.52	-1.5%
3	New York, NY	\$154.31	-5.2%
4	Tampa, FL	\$142.56	7.7%
5	San Diego, CA	\$138.65	2.9%

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Figure 21: Top 5 U.S. Markets – Occupancy – YTD June 2021

Rank	Destination	Occupancy	Percentage Pt. Change
1	Tampa, FL	70.4%	17.0%
2	Miami, FL	68.5%	14.2%
3	Phoenix, AZ	61.7%	8.1%
4	Norfolk/Virginia Beach, VA	58.9%	14.9%
5	Los Angeles, CA	58.2%	7.3%
17	Hawaiian Islands	48.1	-3.2%

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Figure 22: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD June 2021

Rank	Destination	Revenue Per Available Room	% Change
1	Maldives	\$390.84	31.2%
2	Maui	\$247.09	13.1%
3	French Polynesia	\$198.43	NA
4	Cabo San Lucas+	\$190.29	95.8%
5	Hawai'i Island	\$163.68	10.9%
6	Puerto Rico	\$145.73	74.9%
7	Aruba	\$124.50	NA
8	Kaua'i	\$116.19	-14.2%
9	Cancun+	\$102.99	37.2%
10	O'ahu	\$91.33	-24.8%
11	Costa Rica	\$63.60	-19.1%
12	Puerto Vallarta+	\$52.61	42.2%
13	Fiji	\$14.76	-63.6%
14	Bali	\$8.96	-67.8%
15	Phuket	\$7.99	-86.8%

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Figure 23: Competitive Sun and Sea Destinations – Average Daily Rate – YTD June 2021

Rank	Destination	Average Daily Rate	% Change
1	Maldives	\$793.76	8.1%
2	French Polynesia	\$634.31	NA
3	Maui	\$475.25	10.2%
4	Cabo San Lucas+	\$445.83	38.0%
5	Hawai'i Island	\$319.19	16.7%
6	Aruba	\$292.12	NA
7	Kaua'i	\$268.55	-8.1%
8	Puerto Rico	\$239.25	7.6%
9	Cancun+	\$199.41	-1.2%
10	O'ahu	\$197.41	-15.8%
11	Costa Rica	\$179.70	-9.1%
12	Puerto Vallarta+	\$105.87	14.6%
13	Phuket	\$82.99	-46.5%
14	Bali	\$64.22	-34.6%
15	Fiji	\$60.93	-49.6%

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Figure 24: Competitive Sun and Sea Destinations – Occupancy – YTD June 2021

Rank	Destination	Occupancy	Percentage Pt. Change
1	Puerto Rico	60.9%	23.4%
2	Maui	52.0%	1.3%
3	Cancun+	51.6%	14.5%
4	Hawai'i Island	51.3%	-2.7%
5	Puerto Vallarta+	49.7%	9.6%
6	Maldives	49.2%	8.7%
7	O'ahu	46.3%	-5.5%
8	Kaua'i	43.3%	-3.1%
9	Cabo San Lucas+	42.7%	12.6%
10	Aruba	42.6%	42.6%
11	Costa Rica	35.4%	-4.3%
12	French Polynesia	31.3%	31.3%
13	Fiji	24.2%	-9.4%
14	Bali	13.9%	-14.4%
15	Phuket	9.6%	-29.3%

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